

Items will be noted if additional testing is recommended.

Please note, most of the “bugs” and/or “enhancements” listed on this document do not require additional testing. This is intended for informational purposes only.

*Note: Courts impacted will be identified following the title of the change.*

**Hosted Courts: Models** are those courts using the Standard Solution TrueFiling and Standard Solution OnBase review. Warren District, Washtenaw Circuit, and Ottawa Probate

**Hosted Courts: Pilots** are those courts using the Standard Solution OnBase review queue but have their own version of TrueFiling (e.g., different filing types). Current courts are Oakland Circuit and Wayne Circuit

**On-Premise Courts** are those courts using both their own OnBase and their own version of TrueFiling. Current courts are Macomb Circuit, Ottawa Circuit and Grand Traverse/Leelanau/Antrim Circuit

**Integrated Courts** are those courts with full or partial CMS integration. Current courts are Wayne, Washtenaw, and Ottawa Probate

*Note: Some features in this release can be turned on and off based on the court preference and cannot be identified by the above-listed terms. The courts impacted will be further clarified by naming the court under the feature.*

**Release to UAT:** 02/08/2021

**Release to PROD Date:** 06/07/2021

## What's New (MiFILE: TrueFiling)

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## What's New (MiFILE: OnBase)

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## MiFILE: TrueFiling

### New TrueFiling Buttons

#### 1. “I am this Person” Button

The MiFILE TrueFiling user can use the “I am this Person” button, when available, to link a party or attorney that is shown on an existing case to the MiFILE TrueFiling user’s email address associated with their registration information. The “I am this Person” button will only be displayed if an email address is not associated with an attorney or party.

**ANDREA TEST V. JOHN DOE**  
2020-081320-CK  
MI SCAO Circuit Court  
Case Type: CK

File to this Case Pay Additional Amount Add Party to Case Add Counsel to Case

**▼ Counsel (1)**

Name	Firm	Parties Represented
Marc Steiger (MI-P12345)	ImageSoft Test	Andrea Test, Plaintiff 1

**▼ Case Parties (2)**

Name	Party Type	Represented By
Andrea Test	Plaintiff 1	Marc Steiger (MI-P12345)
John Doe	Defendant	

I am this Person I am this Person

#### 2. “Add Party to Case” Button:

If a MiFILE TrueFiling user needs to request to be added as a party to a case that was previously initiated and accepted by a MiFILE court, the MiFILE TrueFiling user will use the “Add Party to Case” button and submit the required information along with supporting documentation for review and handling by the court.

**Case Details**

**BETTY BOOP V. OLIVE OYL**  
2020-101320-CZ  
MI SCAO Circuit Court  
Case Type: CZ

File to this Case Pay Additional Amount Add Party to Case Add Counsel to Case

**▼ Counsel (0)**

Name	Firm	Parties Represented
No attorneys found.		

**▼ Case Parties (2)**

Name	Party Type	Represented By
Betty Boop	Plaintiff	Self-Represented
Olive Oyl	Defendant	

## 3. “Add Counsel to Case” Button:

If a MiFILE TrueFiling user needs to request to be added as an attorney to a case that was previously initiated and accepted with a MiFILE court, the MiFILE TrueFiling user will use the “Add Counsel to Case” button and submit the required information along with supporting documentation for review and handling by the court. Note that this feature first requires that the represented party be listed in MiFILE. If the represented party is not listed, an add party request would need to be submitted and accepted by the court first.

**Case Details**

**BETTY BOOP V. OLIVE OYL**  
 2020-101320-CZ  
 MI SCAO Circuit Court  
 Case Type: CZ

File to this Case   Pay Additional Amount   Add Party to Case   **Add Counsel to Case**

**▼ Counsel (0)**

Name	Firm	Parties Represented
No attorneys found.		

**▼ Case Parties (2)**

Name	Party Type	Represented By
Betty Boop	Plaintiff	Self-Represented
Olive Oyl	Defendant	

## New e-Servicing Functionality

### 1. Service Recipients:

Case contacts, including standard and verified contacts are being removed from MiFILE. Only individuals with a legal interest in a given case will be listed on a case, and eligible as e-service recipients. Any service recipient listed with an email address associated with their name will be available to receive e-service through MiFILE. If a case participant has indicated they have representation, the attorney will receive e-Service through MiFILE on behalf of the case participant. Parties on a case who are not visible in MiFILE, or who have not connected to the case, will need to be served by traditional means.

File to: MI SCAO Circuit Court  
 Case Number: 2020-081320-CZ  
 Case Title: ANDREA TEST V. JOHN DOE

File:  ☒ File Document ☒ Serve Document

**Add Party to Case** **Add Counsel to Case**

**► Counsel (1)**

**► Parties (2)**

Filing Name	File Size	Filing Type	Upload Status	Fee
Add Counsel Updater: Rebecca Korte	3.43 KB	ADD-COUNSEL FORM	✓	\$0.00
Appearance	13.18 KB	Appearance - \$0.00	✓	\$0.00

After upload, select and hold the stacked dots beside the filing document and then drag to connect to another filing document.

[Click here to upload file\(s\) -or- drag and drop](#)

Max file size: 25.00 MB

**Select Recipients**

Name	Role	Email	Type	AS
Mari Stinger	Attorney (MI P12345)	andrea.stinger@gmail.com	E-Serve	<input checked="" type="checkbox"/>
John Doe	Defendant	unknown	Not Served	<input type="checkbox"/>

Note: A courtney may recipient is not considered a service recipient.

[Send Counseling Log](#) [Remove Proof of Service](#)

If a service recipient is grayed out, their email address is currently unknown or invalid. They may need to be served the document by another method as required by court rule or law.

**Save Progress** **Cancel** **Next**

## Non-Public Case Functionality

### 1. Searching for a Non-Public Case

If a case is marked by the court as “Non-Public,” the MiFILE TrueFiling user will need to provide the entire case number in order to pull up the case. The MiFILE TrueFiling user will not be able to locate the case through the search using a portion of the case number or the case name.

### 2. Non-Public Case Details

If a case is marked by the court as “Non-Public,” and the MiFILE TrueFiling user is not a party or attorney on the case, the case title will display as [NON-PUBLIC CASE], the Case Parties section will display “Case party information is unavailable because this is a non-public case.”, and the Counsel section will display “Attorney information is unavailable because this is a non-public case.”

### 3. “Add Counsel to Case” button

If a case is marked by the court as “Non-Public,” and the MiFILE TrueFiling user is not a party or attorney on the case, the “Add Counsel to Case” button will not be available for selection.

### 4. “Serve Documents” option

If a case is marked by the court as “Non-Public,” and the MiFILE TrueFiling user is not a party or attorney on the case, the “Serve Documents” option will not be available for selection.

### 5. “Courtesy Copy” button

If a case is marked by the court as “Non-Public,” the MiFILE TrueFiling user will not have the “Send Courtesy Copy” button available for selection.

### 6. Case Title on History Page

If a case is marked by the court as “Non-Public,” the MiFILE TrueFiling user will see the case title as [NON-PUBLIC CASE] when viewing the case on the History Page.

### 7. Case Title in Emails

If a case is marked by the court as “Non-Public,” the MiFILE TrueFiling user will see the case title as [NON-PUBLIC CASE] in emails that contain case title information.

### 8. Case Title in Receipts

If a case is marked by the court as “Non-Public,” the MiFILE TrueFiling user will see the case title as [NON-PUBLIC CASE] in receipts that contain case title information.

## MiFILE: OnBase

### Party Management Functionality

#### 1. Party Management: Accepting a New Case

At case initiation, each named party will be associated with a party type. If a named party cannot be auto-matched to the list of party types provided in OnBase by the court, the clerk will be required to manually select the party type from the available list. The party types available in this list will vary from each court due to CMS integrations.

**Feature Enabled:** Wayne, Washtenaw, Warren, Ottawa, and Oakland

#### 2. Party Management: Adding a New Party to an Existing Case

When a MiFILE TrueFiling user submits an add party request, a bundle including the add party e-Form will appear in the “Clerk Review” queue. The clerk will review the filing and add party e-Form to determine if each should be accepted, rejected, or placed on hold.

**Feature Enabled:** Wayne, Washtenaw, Warren, Ottawa, and Oakland

Case Participant: Andrea Test

Filer's Reason:

Filer Selected Party Type: Plaintiff/Petitioner

Decision

☒ Accept
 ☐ Reject
 ☐ Hold
 Hold For  Days \*

Party Information

Participant Type

Please select a Participant Type  ☐ Self Represented

Representation

Entity Information

Last Name

First Name

Middle Name

Suffix

Test

Andrea

Address Information

Save

Cancel

## 3. Party Management: Adding a new Attorney to an Existing Case

When a MiFILE TrueFiling user submits an add attorney request, a bundle including the add attorney e-Form will appear in the “Clerk Review” queue. The clerk will review the filing and add attorney e-Form to determine if each should be accepted, rejected, or placed on hold.

**Feature Enabled:** Wayne, Washtenaw, Warren, Ottawa, and Oakland

Primary Viewer

Bundle for Case 2020-000001-CK - Submitted: 6/28/2020 1:26:15 PM

Case

Number: 2020-000001-CK

Caption: Test Case 1

Case Type: CK

Court: MI SCAD Circuit Court

Judge:

Bundle ID: 25663

Case Status:

Service Type: File and Serve

Fees

Waived: No

Waiver Type: N/A

Bundle Total: \$0.00

Adjusted Total: \$0.00

Filings

#	Name	Fee	Status	Workflow	Previous Workflow	CMS Code	Clerk
1	APPEARANCE (APPEARANCE)	\$0.00	PAID	CLERK REVIEW	N/A		
2	PROOF OF SERVICE	\$0.00	PAID	CLERK REVIEW	N/A	POS	

Officials

Name	Bar Number	Firm	Status	Clerk
Michelle Telecky	PD-030680	Telecky TPUAT Law	PAID	

Internal Reviewer Notes

## 4. Party Management: Auto-Accepting attorney e-Form

If the document filed is “Accepted” and the court has configured the system to auto-accept attorney requests, the add counsel e-Forms will automatically be updated to a “Pending Accept” status in the bundle. The clerk will not have to review and accept the **add counsel** e-Form separately; it will automatically be accepted without additional handling.

**Feature Enabled:** Wayne, Washtenaw, Warren, Ottawa, and Oakland

Bundle for Case 2020-061920-CK: JOHN DOE V. ANDREA TEST - Submitted: 6/22/2020 1:19:28 PM

Case

Number: 2020-061920-CK

Caption: JOHN DOE V. ANDREA TEST

Case Type: CK

Court: MI SCAD Circuit Court

Judge: CC JUDGE

Bundle ID: 8056

Case Status: OPEN

Service Type: File Only

Fees

Waived: No

Waiver Type: N/A

Bundle Total: \$0.00

Adjusted Total: \$0.00

Filings

#	Name	Fee	Status	Workflow	Previous Workflow	CMS Code	Clerk
1	APPEARANCE (APPEARANCE)	\$0.00	PENDING ACCEPT	CLERK REVIEW	N/A	C	ACCOLN

Participants

Name	Party Type	Status	Code	Clerk
Andrea Test	Plaintiff/Petitioner	PENDING ACCEPT	DPN	ACCOLN

Internal Reviewer Notes

Submitter

Name: Colen, Andrea

Phone:

Email: acoln@imagesoftinc.com

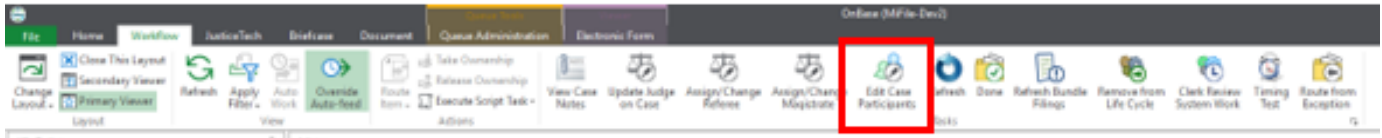
Save

Cancel

## 5. Party Management: Manually adding a new Party or Attorney to an Existing Case

The “**Edit Case Participants**” ad hoc task has been added for courts that are not fully integrated. The clerk can manually add a party or an attorney as a service recipient in MiFILE OnBase using this new ad hoc task.

**Feature Enabled:** Warren, Ottawa, and Oakland





## 6. Party Management: Associating a Document with a Party

Courts that have full CMS integration can choose to associate the documents they work with to parties on the case in order to update their Register of Action entries to include this information. When the “Associate Document to a Party” feature is enabled, an additional icon will appear on the filing line.

**Feature Enabled:** Washtenaw

**Feature Disabled:** Wayne, Warren, Ottawa, and Oakland

Filings								
#	Name	Fee	Status	Workflow	Previous Workflow	CMS Code	Clerk	
1	APPEARANCE (APPEARANCE)	\$0.00	PENDING ACCEPT	CLERK REVIEW	N/A	21REC	ACOLEN	
2	PROOF OF SERVICE (TrueFiling Proof of Service)	\$0.00	PAID	CLERK REVIEW	N/A	POS		
Internal Reviewer Notes								
Save				Cancel				

## 7. Auto Accept Proof of Service

When a filer serves one or more documents, the system will generate a proof of service that will be sent to the court’s DMS. For serve-only documents, if the court has configured the system to auto-accept the proof of service, the clerk will not have to review the proof of service, and it will automatically be accepted into the DMS without additional handling. For filed and served documents, the proof of service will appear with a pending accept status and be automatically coded without additional handling. The court can choose to disable this auto-accept feature, and have all proofs of service be sent to the clerk review queue to be reviewed and accepted.

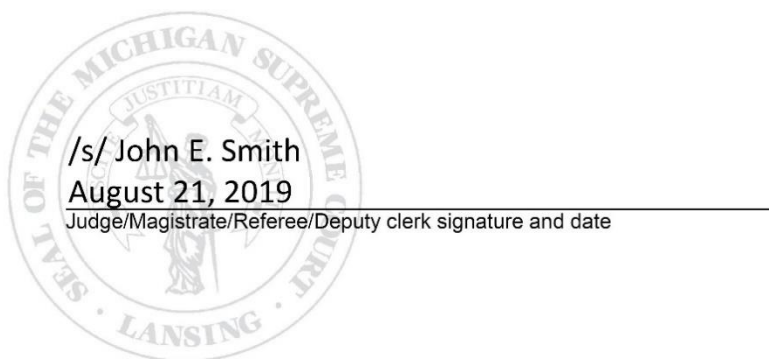
**Note:** The “serve” only option is for formal service. In the past, a proof of service was not filed with the court and was only used to share documents with others without the service being considered “official.” This functionality was changed so that e-Serve feature is now considered e-service. Therefore, when a bundle is submitted, the system will auto-generate the proof of service and file it with the clerk on the filer’s behalf. This feature always generates and automatically files a proof of service with the court, and it should not be used to share or send documents that have not been filed with the court. Only parties, attorneys, or others that have a legal interest in the case are listed as service recipients. If a service recipient does not have an email address recorded in MiFILE, then the documents must be served on them as otherwise required by Michigan Court Rule.

**Feature Enabled:** Wayne, Washtenaw, Warren, Ottawa, and Oakland

### e-Signature with Seal Update

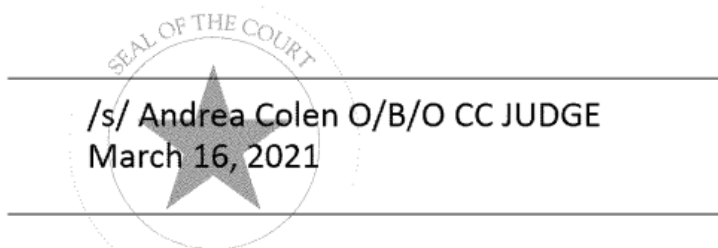
#### 2. e-Signature with Seal: New Format (Hosted)

The e-Signature w/ Seal has been updated to be the e-Signature stacked on top of the current date with the court’s seal affixed over these two lines.



#### 3. e-Signature with Seal O/B/O: Update (Hosted)

The e-Signature w/ Seal O/B/O has been updated to display the currently assigned judge’s name at the end instead of requiring the person placing it to add that manually (this value can be overwritten). The words “on behalf of” have been shortened and now display as “O/B/O.”



### New Import Features

#### 1. Bundle Import 1: Importing documents using the Bundle Import task (Hosted)

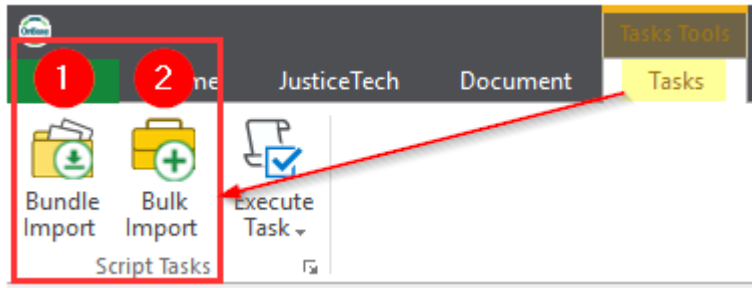
The Bundle Import feature will allow a clerk to upload multiple documents for indexing to the same case and place the documents into the Clerk Review queue as a single bundle.



**Feature Enabled:** Wayne, Washtenaw, Warren, Ottawa, and Oakland

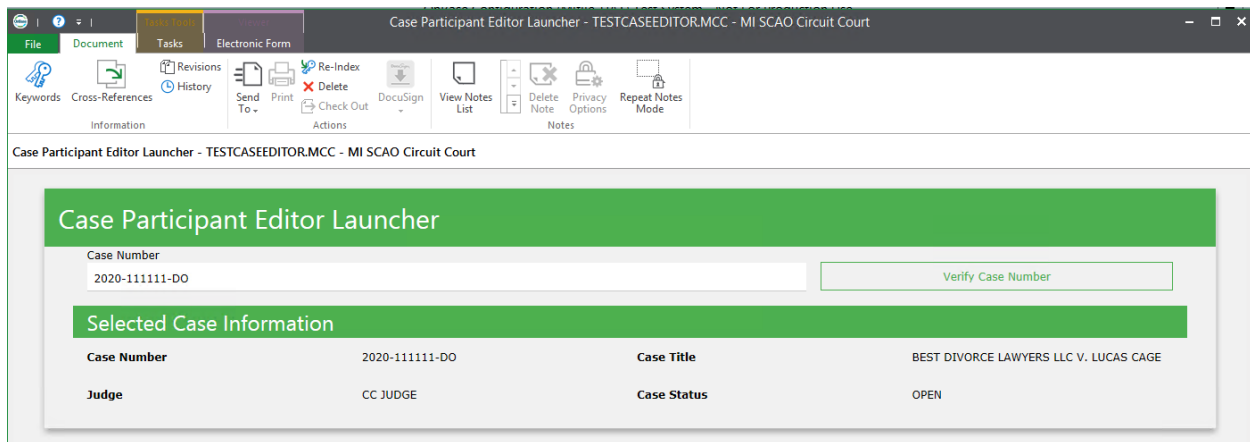
## 2. Bulk Import 2: Importing documents using the Bulk Import task (Hosted)

The Bulk Import feature will allow the ability for a clerk to upload multiple documents to be certified and does not require indexing so the bundle will not route to the Clerk Review queue.



## Case Update Launcher (Oakland Only)

The **Case Update Launcher** is a temporary utility to be used for the modification of participants on a case. The utility takes the case number input from the user and verifies the case is a valid case. Then the user can execute the [Edit Case Participants](#) task to make modifications to the participants stored in MiFILE. This utility is only meant to be used with courts that are not sending participants from their Case Management System (CMS).



## MC 507 - Request for e-Service by MiFILE

The changes to party management are being made to improve the way MiFILE handles case participant information for electronic service and provides a way to request a party or attorney be added to a case after the case has already been started. Any attorney, party, or registered user with a legal interest in a case will use the Add Party or Add Attorney feature and must file a document that supports adding them to the case. For example, an attorney may file an appearance or other document that serves as an appearance. In the case of a nonparty with a legal interest in a case (such as a receiver) or an interested person in a probate case who wants

to be served electronically but who has no specific document (such as an objection or competing petition) to file into the case, must complete and file SCAO-approved [Request for e-Service by MiFILE](#) (form MC 507).

In addition, the transition to MiFILE 2.0 will require the service recipient list for each existing case in MiFILE to be populated one time from the party and attorney information maintained in the court's case management system; in some instances, the attorney e-mail addresses in the case management system will have originated from a file maintained by the State Bar. This means any case contact who is not a named attorney on a case will be removed. Similarly, any case contacts that are not identified parties on the case will be removed.

Filers will be directed through multiple MiFILE 2.0 communications to check their cases in order to reassociate themselves with their cases. If their name displays in the Case Details screen and there is no e-mail address associated with their name, an **"I am this Person"** button will display; and they will need to connect to their case by selecting the button. If the filer's name does not display in the Case Details screen, they will have to complete the Add Party or Add Attorney screen and complete and file SCAO-approved Request for e-Service by MiFILE (form MC 507) for each case in which their information is missing.

In both instances above, because an add party request cannot be submitted without an accompanying document, the filer would be required to fill out the Request for e-Service by MiFILE (form MC 507) in order to officially make their request to become a party on a case.

Once this request is submitted, the court will then process this document. This will come to OnBase as an add party eForm. This add party e-Form will appear in the "Clerk Review" queue with the accompanying MC 507 form. The clerk will review the form by selecting the "pencil" icon to the right of the filing, consider the Request for e-Service by MiFILE, and make the appropriate choice to either **"Accept"**, **"Reject"** or **"Route"** the request for further review. If the filing is being accepted, the clerk will code the document within the "Document Types" section.

Due to this new filing type, the court will have a few options in regards to processing these requests. If the court so chooses, they can create a new description code in order to write this document to the ROA. Creating a new description code is not a requirement, and a court can edit an existing description code language to accommodate the new document type or code this document under an existing description code that the court feels is applicable to the MC-507.

- **Instructions on how to create/edit a description code:**

- ☐ Navigate to the JusticeTech Tab
- ☐ **Click Filters**

- ❑ Click *Court Configuration* under **Court Administration**
- ❑ A **Court Configuration** tab will appear on the right side of Justice Tech. Under *Court Name*, **double click** on your court.
  - A new window will open and your courts Court Configuration Database will populate in the window.
- ❑ Click on the *Document Catalog* tab at the top-middle of the database.
- ❑ Your courts document catalog records will appear under this tab.
  - To add a new document to your document catalog **click** the **+** (*Create Object*).
- Or**
- To edit an existing description code language to accommodate the new document type, **double click** on an existing doc code that you believe aligns with the MC-507 in order to open the document catalog item.
- ❑ A new Document Catalog Item window will appear. You will need to either edit or fill out this form based on your court's preference for coding the document. When filling out/editing this form, please remember:
  - Additional Document Classification: The "Additional Document Classification" for a downstream CMS/DMS. Useful if another type of code must be sent, e.g. a routing sequence
  - Case Categories: The Case Categories this coding is valid for (if the category is not selected, this entry will not appear in the list)
  - Mapped TrueFiling Filing Types: Any Auto-Coding options that have been specified for this item
- ❑ When complete, **click** the *Save and Close* button to save the new document/edited catalog item into the document catalog.
- ❑ An example of a completed Document Catalog Item for Request for e-Service by MiFILE (form MC 507) can be found below.

## SCAO Circuit Court

### Document Catalog Item

Doc Code\*

RQSM

Description

Request for e-Service by MiFILE

OnBase Document Type\*

CC - Miscellaneous

CMS Code

RQSM

Additional Document Classification

RQSM

☐ Confidential ☐ Sealed

☒ Internal Use

Restrict to Role

### Case Categories

#### Circuit Court

☒ Administrative Review and Extraordinary Writs

☐ Adoption

☒ Ancillary Proceedings

☒ Appeals - Civil

☒ Appeals - Criminal

☒ Child Protective

☒ Civil

☒ Criminal

☒ Domestic Relations

☒ Juvenile

☒ Miscellaneous Family

☒ SC

☒ XX

#### District Court

☐ Civil Infraction Non-Traffic

☐ Civil Infraction Traffic

☐ Felony and Misdemeanor Traffic

☐ Felony Non-Traffic

☐ Felony OUIL

☐ General Civil

☐ Misdemeanor Non-Traffic

☐ Misdemeanor OUIL

☐ Parking

☐ Small Claims

☐ Summary Proceedings

#### Probate Court

☐ Civil

☐ Conservatorships and Protective Orders

☐ Estates

☐ Guardianships

☐ Judicial Admissions and Mental Commitments

☐ Miscellaneous Matters

☐ Probate Other

☐ Trusts

### CMS/DMS Behavior Upon Acceptance

☐ Don't Send to Case File / CMS

Cloud DMS Default Route Queue

### Mapped TrueFiling Filing Types